Creating Your Volunteer Certificates

CALIFORNIA VOLUNTEERS
Office of the Governor

My Turn Volunteer

A quick tutorial on how to efficiently insert your volunteer data using the mail merge function

To complete this task without inputting each volunteers’ name manually, we will be using the “Mail Merge” Function with Microsoft Word and Excel. In order to do this you will need an Excel spreadsheet of your volunteers’ names first.

What you will need:

CV Certificate Attached

You can choose to download any based on preference

"Volunteer Names Template" Excel Document Attached

Microsoft Excel

Microsoft Word

Please Note:
If you have trouble editing or accessing any of these attached documents, please see the next slide. If not, skip to Part 1

Troubleshooting: What To Do If...

Your document says it is "Read Only"

Make sure the document is fully downloaded. There should be an "Enable Editing" bar that pops up at the top. Click this and you should be able to edit the document.

If neither one of these work, or additional problems arise please feel free to reach out to a member of the California Volunteers Team and we will be more than happy to assist you :)

When downloading the documents, your Excel sheet and/or Certificate reads "Merge Data not found"

If either attached documents have this pop-up, click any of the options that mention deleting Mail Merge data. We want to make sure these are seperate documents that we will connect to Mail Merge later in the process. If this continues to be a problem, create your own separate Excel spreadsheet with identical fields and colums to the "Volunteer Names Template" spreadsheet.

Part 1: How to Create your Excel Spreadsheet

Step 1

Open the “Volunteer Names Template” Excel spreadsheet attached.

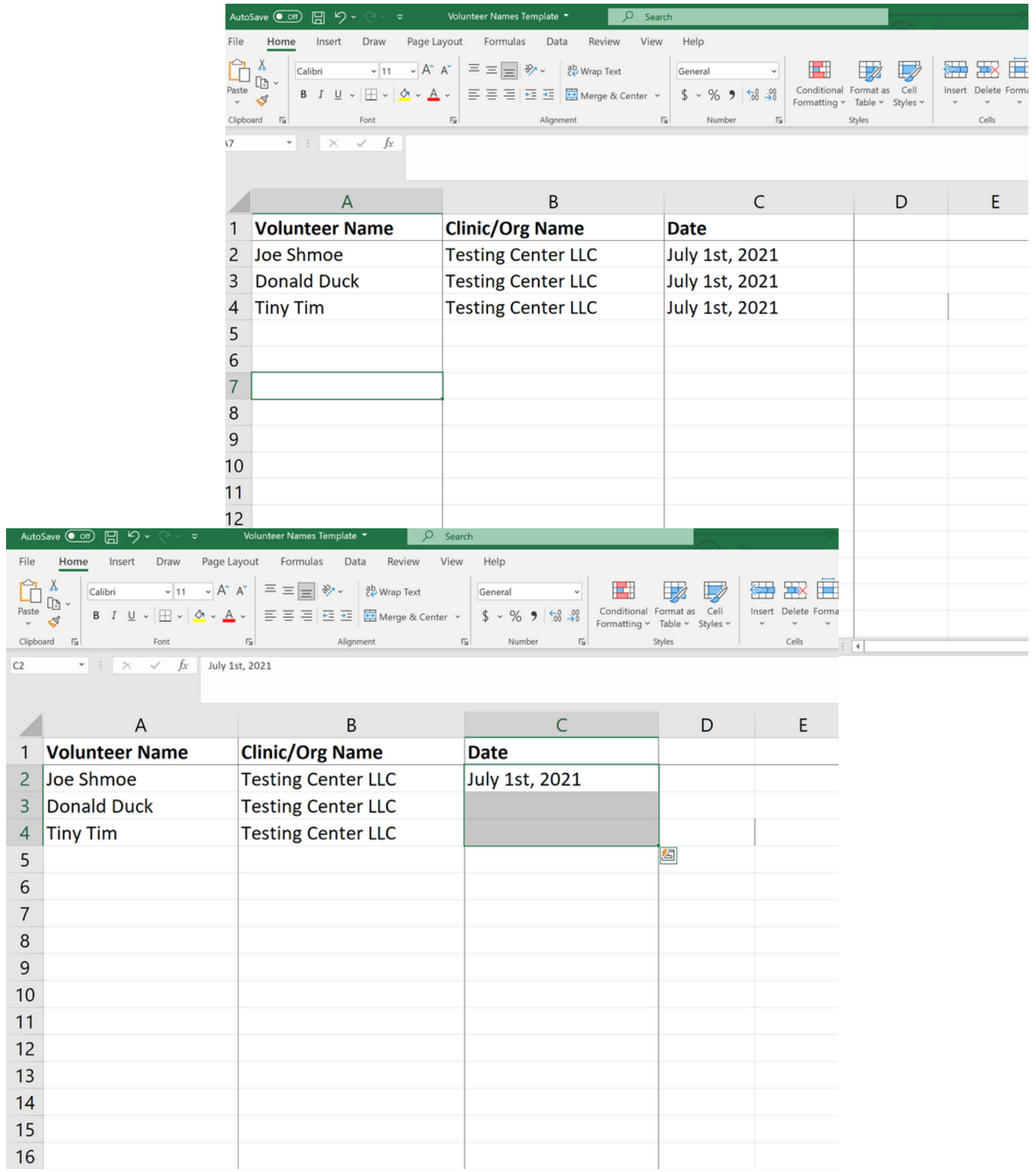
Step 2

Insert your data into the columns “Volunteer Name” “Clinic/Org Name” and “Date”

NOTE: Instead of manually typing your “Clinic/Org Name” for the entire column, highlight and click **Ctrl + Enter**. You can also repeat this process for the “Date” column.

Once your Excel spreadsheet is fully filled out, Save your progress and continue to Part 2.

Example Screenshots



Part 2: How to Create Your Certificates

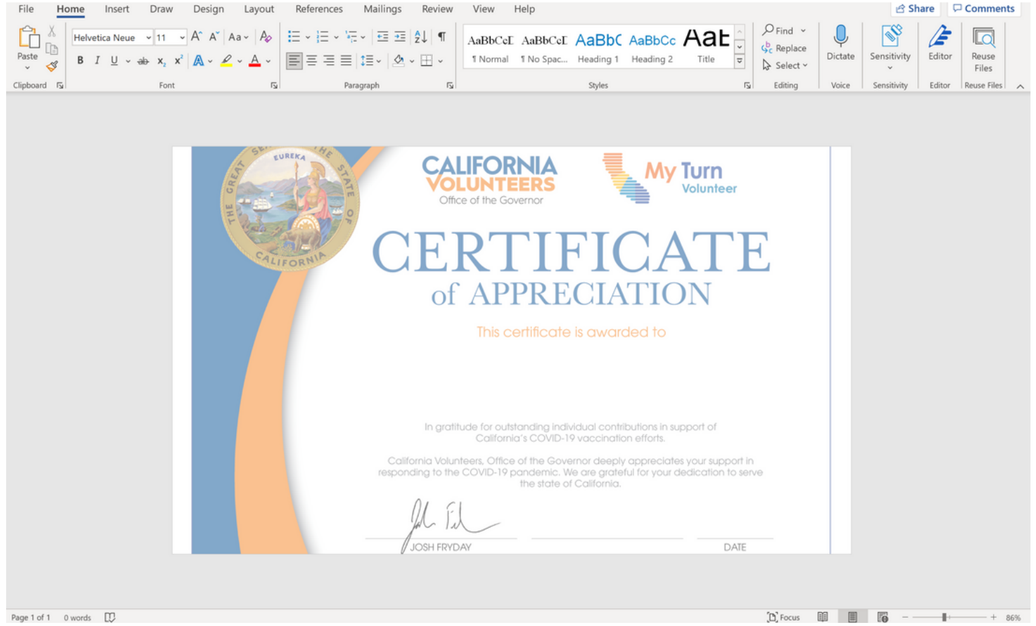
Step 1

Open the word file version of the certificate that you desire to distribute.

Step 2

Click “Mailings” in the menu toolbar at the top of the page

Example Screenshots



Part 2: How to Create Your Certificates

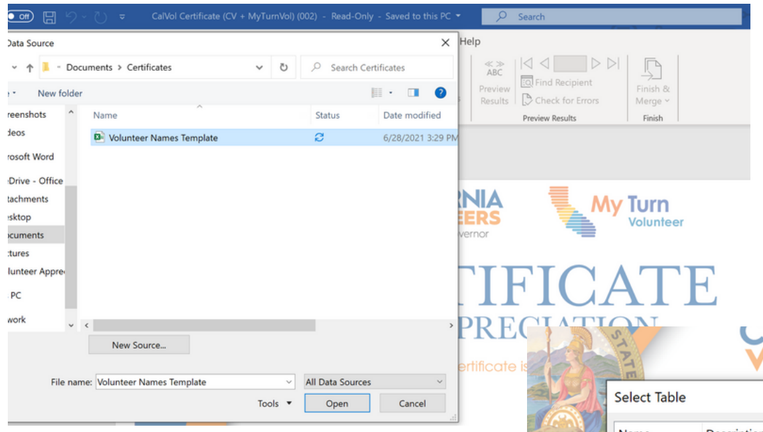
Example Screenshots

Step 3

From the Mailings section click “Select Recipients” then choose “Use an Existing list” from the dropdown

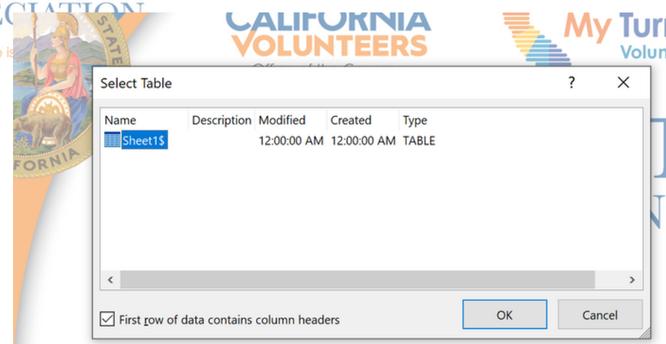
Step 4

Select the Excel spreadsheet file you created in Part 1.



Step 5

Click “OK” when the “Select Table” screen pops up. (this may not happen on your screen, that is OK)



please see next slide for clarifications on other pop- up options

Other Pop-Up Options

Option 1

If you get a pop-up that asks if the file you are trying to merge is from a trusted source – Click “Ok”

Option 2

If a pop-up box asks what cell range you are working with, be sure to select “Entire Workbook”

You are ready for Step 6!

Part 2: How to Create Your Certificates

Step 6

Under the “Mailings” menu toolbar, find and click “Insert Merge Field”. Place your cursor in the area where you would like the Merge Field.

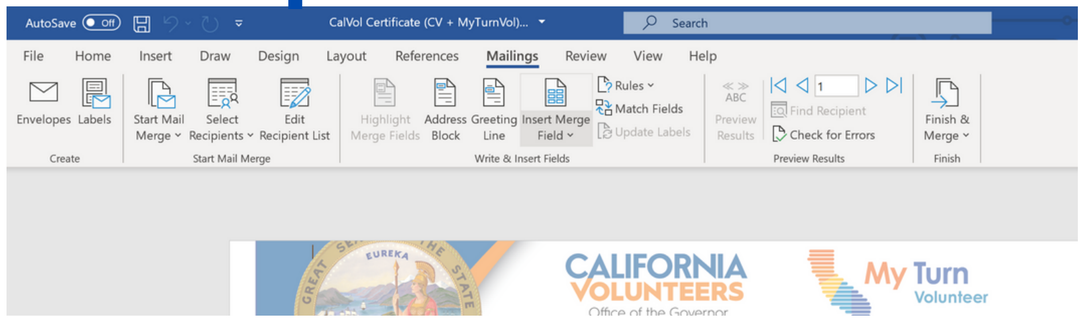
Step 7

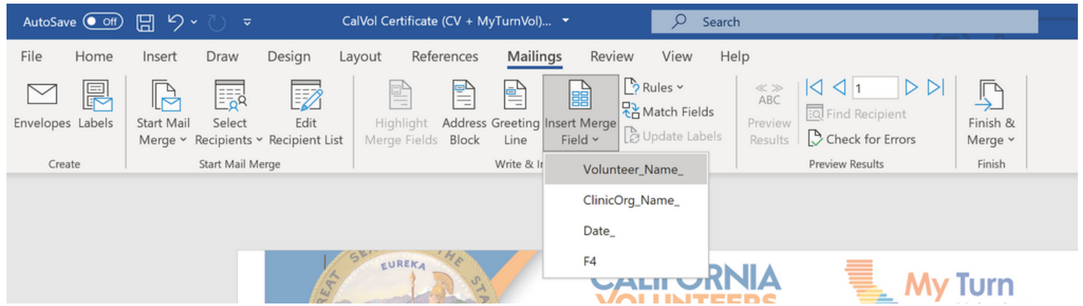
Select “Volunteer Names” from the drop down. You will notice that “Volunteer Names” will appear on the certificate.

Step 8

Move this textbox to your desired area for the names on the certificate. Change the font, spacing and sizing as necessary. The way in which you format this will be identical as to how your names appear on the certificates.

Example Screenshots





Before

After

Part 2: How to Create Your Certificates

Step 9

Repeat steps 6-8 for “Clinic/Org Name” as well as “Date” and format accordingly. This may require moving around the spacing as well as changing font sizes and text orientation.

Step 10

You can preview what the end result will look like before the mail merge by selecting “Preview Results” under the Mailings menu toolbar. This will be helpful for you to know whether you need to change formatting issues before creating all the certificates at once.

You are now ready for your mail merge!

Example Screenshots

Part 2: How to Create Your Certificates

Step 11

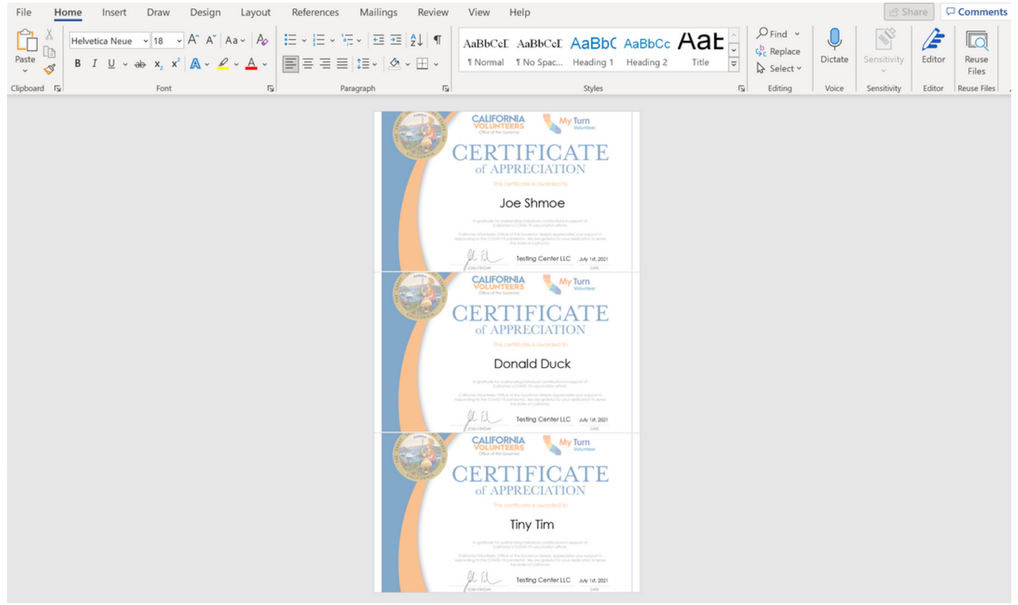
Once all Merge Fields are inserted into all relevant areas of the certificate, under Mailings, go to“Finish and Merge”

Step 12

If you want to preview each certificate prior to completing to check for errors, select "Edit Individual Documents." (This step is recommended.)

Your certificates are being processed! Make any necessary edits after they are done merging and you are done! These certificates will all be in one Word document. If you wish to split your certificates for individual distribution, please see optional Part 3.

Example Screenshots



Part 3: Splitting Your Individual Certificates

Optional!

Step 1

In order to complete this step, we recommend converting your Word document to a PDF. This allows for more options with formatting.

Step 2

To do this under “File” select “Save As” and change the format to PDF

NOTE: You may have to sign in with a Google Account but you do not have to own a paid version of Adobe Acrobat. Follow the instructions. You will be able to split up to 20 files at one time.

Step 3

If you already have a full version of Adobe Acrobat you can split your files within that system.

If you do not have a full version of Adobe Acrobat , you can split your files using this free service: https://tinyurl.com/SplitFiles. See above for additional information.

The process is complete!

Congratulations on creating your Volunteer Certificates!